CGimmal **Technical Users Installation Guide**

Gimmal Physical

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Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Terry Butler	03/28/2022	3.11	Created for Gimmal Version 3.11
2	Marta Farensbach	12/1/2022	3.12	Minor formatting updates



For Windows 2016

- 1. Open Server, click Manage at the top and then click Add Roles and Features.
- 2. Click Next three times to reach the 'Select Server Roles' screen and open Web Server.
- 3. Be sure the following options are selected:

```
.NET Framework 3.5 Features
    .NET Framework 3.5 (includes .NET 2.0 and 3.0)
.NET Framework 4.6 Features
    ASP.NET 4.6
Web Server (IIS)
    Management Tools
        IIS 6 Management Compatibility
             IIS 6 Scripting Tools
             IIS 6 Metabase Compatibility
             IIS 6 WMI Compatibility
        IIS Management Console
    Web Server
        Application Development
             Application Initialization
             ASP.NET 4.6
             ISAPI Extensions
             ISAPI Filters
             .NET Extensibility 3.5
             .NET Extensibility 4.6
        Common HTTP Features
             Default Document
             Directory Browsing
             HTTP Errors
             HTTP Redirection
             Static Content
        Health and Diagnostics
             HTTP Logging
        Performance
             Static Content Compression
        Security
             Basic Authentication
             Request Filtering
             Windows Authentication
```



Gimmal Physical will provide the following files for on-premises installations:

- 1) A backup file to be restored in SQL Server database (.bak or backpac)
- 2) A setup file to install the main application on the Web Server (exe)
- 3) Hangfire.zip. The Hangfire service is responsible for running all the batch processes and large imports/exports.
- 4) CRUD (Create, Read, Update and Delete) folder

The first step in installing Gimmal Physical is to restore the database backup on the SQL Server.

Restore Database

- 1. Open the SQL Server Management Studio and right-click Databases and choose the Restore Database option in Object Explorer.
- 2. Select the **Device** option.
- 3. Select the database backup file downloaded from the FTP site (button to the right of text field).
- 4. Select or type the name of a new or existing database in the Database drop down field. (Continued on next page.)

Restore Database - DEMO								
A tail-log backup of the source	database will be taken. View th	his setting on the O	ptions page.					
Select a page	Script + 🚺 Help							
General Files Options	Source 💮 Database:							•
	Device:	C:\Databa	se Backups\D	EMO.ba	k		3	
	Database:	DEMO						-
	Destination							
	Database:	DEMO						•
4	Restore to:	The last b	ackup taken (i	Friday, N	lovember 21	, 2014 8:39:	50 .	Timeline
	Restore plan							
	Backup sets to restore:							
	Restore Name		Component	Туре	Server	Database	Position	First LSN
	DEMO-Full (Database Backup	Database	Full	IMARTIN	DEMO	1	36000009416000
Connection								
ILSERVER2008ENT\SQL2012 (sa)								
View connection properties								
Progress			_					
Oone Done	•	m					Ve	rify Backup Media



- 5. Click the **Files** tab to verify the file paths are valid.
- 6. Click **OK** to perform the restore.

A tail-log backup of the source data	atabase will be taken. View	this setting on t	he Options page.		
Select a page	🖾 Script 🔹 🚺 Help				
Files Options	Restore database files	as to folder			
	Data file folder	1	E:\DatabaseFiles		
	Log file folder		E:\DatabaseFiles		
	Logical File Name	File Type	Original File Name	Restore As	
	INFOLINX_WE	Rows Data	C:\Program Files\Microsoft S	C:\Program Files\Microsoft S	
	INFOLINX_WE	Rows Data	C:\Program Files\Microsoft S	C:\Program Files\Microsoft S	
	INFOLINX_WE	Log	C:\Program Files\Microsoft S	C:\Program Files\Microsoft S	
Connection					
Connection ILSERVER2008ENT\SQL2012 [10]					
Connection ILSERVER2008ENT\SQL2012 [sa] View connection properties					
Connection ILSERVER2008ENT\SQL2012 [sa] View connection properties Progress					
Connection ILSERVER2008ENT\SQL2012 [sa] View connection properties Progress Done					

Install Application

On the Web server, follow these steps to install the application.

- 1. Open the install file.
- 2. If you agree to the license agreement, click through until you reach the 'Installation Type' page.
- 3. Choose the **Installation Type** that is most appropriate for your organization. In most cases, this is 'Typical' or 'Complete'. Click **Next**.
- 4. Enter the Website and Web Service Name you want to use with IIS.



Gimmal Physic	×	
Please enter the w	4	
Please enter the se	ttings for the web site.	
Website Name	GimmalPhysical	

5. Enter the database information and then click **Next**.

Gimmal Physical	InstallShield Wizard	×
Database Settings Please enter the datab	ase settings	と
Database Server Name	<u></u>	
Database Name		
Database User Name	<u></u>	
Database Password		
InstallShield		
	< Back N	ext > Cancel

The Gimmal Physical application is now installed. If you are using Windows Authentication for your Gimmal Physical system, please read the next paragraph as well as the Windows Authentication section at the end of this document.

Windows Authentication

Before you can access the Gimmal Physical application one or more valid windows security groups must exist in the Gimmal Physical roles table. If no roles in the roles table match any of your network windows security groups, you will get an HTTP 403 Forbidden message. To temporarily get the system up and running, it is recommended to rename the Gimmal Physical administrator role in the Gimmal Physical database to match a valid windows security group on your network. To do this, open the ROLES table in the Gimmal Physical database and update the ROLE_NAME field for the role with ROLE_ID 1 to DOMAIN\Domain Users where DOMAIN is your network domain name.



Gimmal Physical as its own web site

In some organizations, the desired configuration is to create a new web site in the IIS manager that uses port 80 but utilizes HTTP headers to route traffic to the correct site (i.e., gimmalphysical.yourdomain.com). This configuration is supported and Gimmal Physical works fine. However, the Gimmal Physical setup program does not currently install to a separate web site on port 80 with an http header. If this is the desired environment, install Gimmal Physical to a virtual directory and then copy all the files using Windows Explorer into your separate Gimmal Physical web site.

Installing CRUD pages

Copy the provided CRUD folder under the Application/ItemTypesCRUD folder. The default path is: C:\inetpub\wwwroot\Gimmal\3.11\Application\ItemTypesCRUD\

Installing Hangfire

Included with the installation files is the Hangfire.zip file. To install this:

- 1. Unzip the Hangfire.zip file.
- Copy the Hangfire folder into Application folder that was created during the installation of the Gimmal Physical software. Note if you have changed the default install directory the InstallHangfire.cmd will need to be updated accordingly.
- 3. Update InfolinxHangfire.exe.config with correct database connection string after installing.
- 4. Run the InstallHangfire.cmd
- 5. Open Services and set properties for the Hangfire service. If using integrated security in the database connection string, the service will need to run under a service account that can access the database. The recovery options should all be set to Restart the Service.
- 6. In the Gimmal Physical web site go to Admin/Application settings and select the value for the setting Hour to run background jobs in UTC time.

Cimmal Quick Start Guide

Gimmal 🔐	ome 🖉 Preferences 🏭 Labels 🕒 Repo	rts 💩 Requests 🔞	Admin 🕜 D	ashboard (?) Help	Print	Top level menu			 [→ Logout
🐂 File	es 🔚 Boxes 🛛 🖗 Shelves 🌱 Locat	tions 🐖 lers 🗰	Records Sche	dules 🔒 Legal	Holds				
Disposition Noti	ces 📄 Digital Content 🚮 Organizatio	ons 🗸 🛛 Data	Tabs						
Box Number	Organization Re	cords Schu	tears		Box Size	0.0	ck Search		
Search Clear	(Rollover for Current Search) Switch)							
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	(reduest hickup) (reduest penter)	Transfer (Transfer Fro	Plint	avera / Add To t	care search +	view + Change +	Action I	menu	(4 items)
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4

- 1. Top Level Menu provides access to the various indicated functions
- 2. Data Tabs used to access the various items being tracked
- 3. Quick Search used to query within tabs
- 4. Action Menu provides access to listed actions
- 5. Home Page Grid displays queried results

User Administration

Gimmal Physical operates in two modes for user authentication:

- **Forms Authentication**: the username and password are managed by the Gimmal Physical database.
- □ Windows Authentication: the username and password are managed in the Windows NT Domain or Windows Active Directory

CGimmal Forms Authentication

When using Forms Authentication, the user is prompted with an Gimmal Physical login screen where they must enter valid credentials to access the system.

Add Users to Gimmal Physical:

- 1. Click the **Users** tab on the Home Page.
- 2. Click **Create** in the Action Menu.

G Gimmal	Home Ø Pre	ferences IIII Labels	Reports	A Requests	(i) Admin	🕜 Dashboard	(7) Help	Print				[→ Logout
	🖿 Files 📰 Box	es 💿 Shelves	TLocations	a Users	m Record	ds Schedules	Legal H	lolds Or	rganizations			
User Name	Rol		First Na	ime	Las	st Name		Email		Transit Information	User Barcode	
Search	Clear (Rollover fo	r Current Search) Switch	1								
Create	Update Print Labe	Is Add To Cart	Search 💌	Vi	Change 🔻	Reset Passw	ord					(0 items)
r Va	np to Page: G	The sear	ch found 0 Users									^
	ne Role First Nan	e Last Name En	ail User Barco	ode								
2												

3. Enter the user's information and click **Save & New** to create a new user.

C Gimmal	Home Home	Ø Preferences	THE Labels	(C) Reports	& Requests	🔞 Admin	Dashboard	() Help	Print	tt [→ Legovt
* Create	User									Cancel Set Defaults Save & Close Save & View Save & Now
Fields market	d with an " are	required.								
	*U	Iser Name: su	peruser							
		Password:	•						0	3
		Ver	rify password							
		*Role:		*						
	Login	Disabled:								
	Force New	Password:								
	*F	irst Name:								
	*[ast Name:								
		Email:								

CGimmal Windows Authentication

When using Windows Authentication, the user is prompted with a Windows login dialog where they enter their network username and password.

Once a user is authenticated, Gimmal Physical compares the Role Name to see if the user is a member of any of the Gimmal Physical Roles.

If the user is not a member of any of the Roles assigned in Gimmal Physical, an **HTTP 403 (Forbidden)** error is generated. Gimmal Physical Roles must exist as Security Groups in the Windows domain.

For example, if SSI is the domain name.

1. Create a Windows Security Group in the Domain called Gimmal Physical Administrators.

Gimmal Physical Administrators	Security Group - Global
Gimmal File Room Users	Security Group - Global
Gimmal General Users	Security Group - Global

2. On the top menu, click **Admin**. Click **Roles and Permissions** and click **Edit**. Edit the name of the Gimmal Physical Administrator Role with the name SSI\ Gimmal Physical Administrators.

Gimmal	Home Ø ?	raferences 👬	Labela 🕲 Reports	A Requests	(g) Admin	(2) Dashboard	🕐 Help 👌 Print	[→ Lapon
Manage Ro	oles							Close Create Rol
Role Permise	sions Role Prefer	onces Delete	Role Name				Role Description	
Edit	Edit	Owleta	Administrators				Administrators of the system.	
Edit	Edit	Delete	Fileroom				Fileroom Users	
Edit	Edit	Delete	General				General Users	
2								

3. Change the name to match the syntax DOMAIN NAME\Security Group Name (i.e., SSI\ Gimmal Physical Administrators) and click **Save** toupdate the role name.

C Gimmal	Home Preferences	tem Labels	(PReports	A Requests	🔞 Admin	Dashboard	(?) Help	Print Print	 	 	 	0	→ Logout	
Update A	dministrators Role											Close	Save	
Role Inf	ormation													
Name:	Administrators													
Description:	Administrators of the	he system.											3	
	Modify List Secur	rity for This Ro	le											



4. The role name will be updated to the new role name entered.

C Gimmal	Home	Preferences	Labels	Preports	& Requests	😥 Admin	Dashboard	(?) Help	Print		[→ Logout
Update Administrators Role											Close Save
ſ											A
Role Information											
Name:	SS	[SSI/GimmalAdministrators									
Description:	Ad	Administrators of the system.									
	M	odify List Securit	y for This Ro	le							
Tab Filter	rs										

Note: The existing Security groups such as Domain Admins and Domain Users can be used if desired.

Refer to the Gimmal Physical on-line Help within the Gimmal Physical application.